# **Polaris Patron Renewal**



- Login to Polaris and open a "Patron Records Search Tool" ("F7") or...
- Click on "Patron Services" and then choose "Patron Records" from the alphabetical dropdown list,



 OR, click on the red button to open the "Patron Services" view of the tool bar and click on the "Patron Records" icon.





#### Searching for your Patron's Registration in Polaris

	Patron Records - Name (Last, First Middle) Find Tool	
	File Edit Tools Options Help	
	General Settings	
	Object: Patron Records   Limit by: (None)	Search Mode     Search     Search     Stop
	Search by: Name (Last, First Middle) Value:	O Power
	Type: Exact match (implicitly truncated)	SQL New Search
File Edit Tools Options Help	Sort by: (None)	Count Only
General Settings	For:	Help
Object: Patron Records		
Search by: Name (Last, First Middle)	For Help, press F1 Stay on Select	
Type: Address Address check date		
Sort by: Barcode Birth date		<u> </u>
For: Email address Expiration date Fax Former barcode	1. Click on the down arrow on the second '	' <u>Search by</u> " field on
For Help, press Free text block Language	the General tab of the Find Tool to chan	ge the search
Last activity date Library-assigned block Local Library Statistic #1 Local Library Statistic #2	parameter and search by, for example, p	atron "Barcode".
Name (First Middle Last) Name (Last, First Middle)	2. Enter the patron name or barcode numb	er in the fifth

Parent/Guardian (LastName, FirstN Patron code Patron's registered library Phone 3. Postal code Record ID Record set ID Registration date Statistical class Where They Live

Patror

For Help,

"For" field and press enter or click on "Search" on the right. If more than one patron has the same name, be sure to select the correct patron from the generated list.

The expiration date on the "Patron Registration Workform" needs to be advanced one year. Click on the down arrow and advance to the correct date by clicking on the arrows.

Patron F	Registration - 5	45513 - Addresses - F	Polaris						
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ation	Barcode: Last name: First name:	2010000002489 Training			Registered at: Patron code:	Peace Library Syste	em (Branch) (APR	PLS)	
egistr	Middle name: Title:	▼ Suffix	c:		Expira Tern	tion: n: 0 🔶 exact	late ▼ Dat	e: 16/04/201 April, 2017	7
	Addresses, Phon Type Home	Street One 8301 - 110 Street	Street Two	City Grande Pra	State	Postal Code T8V 1C9	Sun         Mon         Tu           26         27         2           2         3         -           9         10         1           16         17         1           23         24         2           30         1         -	Wed Thu 3 29 30 4 5 6 1 12 13 3 19 20 5 26 27 2 3 4 Today 29/11	Fri Sat 31 1 7 8 14 15 21 22 28 29 5 6 /2016
	Address Check Term: 0 Notices ad Notification of	dress: Home	Date: 16/04/201	6	Phone	Add 1: 7805384656 2:	Edit F	emove Ma	iling Label
	eReceipt o Email ad	Additional T pption: (None) dress: JoeTraining@g	KT notice		Phone FAX numb Alt Email addre	3: er:			
or Help, pr	ess F1								NUM

The "address check" date on the "Patron Registration Workform" needs to be advanced one year. Click on the down arrow and advance to the correct date by clicking on the arrows.

dit View Links	45513 - Addresses - Polaris Tools Help	, <b>6</b> ()	E?			
Barcode:	2010000002489		Register	ed at: Peace Library S	ystem (Branch) (APRPLS)	
Last name:	Training		Patron	code: Adult		
First name:	Joe					
Middle name:				Expiration:		
Title:	▼ Suffix:			Term: 0 🚔 ex	act date 🔻 Date: 1	5/04/2017
Addresses Pho	ne Numbers					
Type	Street One	Street Two	City	State Postal Code	County	Country
Home	8301 - 110 Street		Grande Prairie	AB T8V 1C9		Canada
Address Check Term: 0	exact data 🔻 🛛 Date	16/04/2017	-  ←	Ad	d Edit Remov	2 Mailing Label
Address Check Term: 0 Notices ad	idress: Home	• 16/04/2017	<b>■</b> ▼ ←	Ad Phone 1: 78053846	56	Mailing Label
Address Ched Term: 0 Notices ad	dress: Home	<ul> <li>16/04/2017</li> <li></li></ul>	<b>.</b>	Ad Phone 1: 78053846 Phone 2:	6 Edit Remov	e Mailing Label
Address Ched Term: 0 Notices ac Notification (	dress: Home bytion: Mailing Address	e: 16/04/2017	•	Ad Phone 1: 78053846 Phone 2: Phone 3:	56 [	e Mailing Label
Address Ched Term: 0 Notices ac Notification ( eReceipt (	exact dat  Date ddress: Home Doption: Mailing Address Additional TXT notic option: (None)	e: 16/04/2017	••••••••••••••••••••••••••••••••••••••	Ad Phone 1: 78053846 Phone 2: Phone 3: FAX number:	56 [	Mailing Label
Address Ched Term: 0 Notices ac Notification eReceipt o Email ac	exact dat     Date       iddress:     Home       option:     Mailing Address       Additional TXT notic       option:     (None)       Idress:     JoeTraining@gmail.cc	e: 16/04/2017	F Alt En	Ad Phone 1: 78053846 Phone 2: Phone 3: An Adverse Phone 3: Phone 3	6   Edit   Remov	A Mailing Label

Confirm the Patron's address. Double click on the address to bring up the edit screen.

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	Barcode:	2010000002489		]	Regis	tered at:	Peace Library Syste	em (Branch) (APRPL	S)
La La	ist name:	Training			Pati	on code: 🏼 🛛	Adult		
U Fii	rst name:	Joe							
Mic Mic	ddle name:					Expirat	ion:		
3	Title:	▼ Suffi:	x:			Term	: 0 ÷ exact	date 🔻 Date:	16/04/2017
<b>D</b>	-1								
Addr	resses, Phon	e Numbers	Sheet To	_	C'h.	Shaha	Destal Code	County	Country
	De	Street One	Street IW	0	City Crando Brairio	State	Postal Code	County	Country
bA- T 1	dress Check erm: 0 Notices ad Notification o eReceipt o Email ad	exact dat	Address: Type: Country: Postal co Street 1: Street 2: XI n City: County: State/pn	de:	Home Canada T8V 6T2 8301 - 110 Stree Grande Prairie AB	•	× A ±d		move Mailing Label
						1			

Confirm the patron's email address and telephone numbers. For cell phones, select the carrier from the drop down list and put a

check mark in the TXT box.

Encourage the Patron to

receive email, text, or					
phone* messages, rather					
than the default by mail	Patron Registration -	545513 - Addresses - Polaris			
than the default, by man.	File Edit View Links	Tools Help			
Notification option: Mailing Address (None)		3 🗙 🎜 🕻 🗶 🖻	Ø <b>1</b>		
Mailing Address Email Address	Barcode:	2010000002489	Registered at:	Peace Library System (Branch) (APRPLS)	•
eReceipt option: Phone 1 Phone 2	Last name:	Training	Patron code:	Adult	•
Phone 3	First name:	Joe			
TXT Messaging	Middle name:		Expire	ation:	
	Title:	▼ Suffix:	Ter	m: 0 🖶 exact date 🔻 Date:	16/04/2017
DO NOT select FAX (not enabled.)	Addresses, Pho	ne Numbers			
	Туре	Street One Street Tw	o City State	Postal Code County	Country
Polaris will then email,	Home	8301 - 110 Street	Grande Prairie AB	T8V 6T2	Canada
phone (telephony*) or send					
text notifications [holds					
	Address Check	k Date: 10/04/0	017 —	Add Edit Remov	ve Mailing Label
almost overdues, card		Exact dati  Date: 16/04/2	01/		TXT
almost expired] to patrons.	Notices a	ddress: Home	Phone	e 1: 7805384656	-
1 - 1	Notification	option: Mailing Address	Phon	e 2: 7809784656 Bell Canada	▼ ▼
*Telephony (automated		Additional TXT notice	Phone	e 3:	
voice messages by	eReceipt	option: (None)	FAX numb	ber:	
voice messages by					
telephone) can be set up	Email a	ddress: JoeTraining@gmail.com	Alt Email addre	255:	
for your library by the PLS	For Help, press F1				NUM
IT manager.					

Remember to **Save** your work!

Polaris will update this registration overnight, but if the patron wants to use their card the <u>same day</u> they renewed it, two further steps are required.

Patro	n Registration - 5	45513 - Addresses - Polaris						
File Ed	lit View Links	Tools Help						
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5	Barcode:	2010000002489		Registere	d at: Pea	ace Library System (Branch	) (APRPLS)	-
ti O	Last name:	Training		Patron o	ode: Adu	ult		•
a	First name:	Joe						
Sti	Middle name:				Expiration	1:		
gi	Title:	▼ Suffix:			Term:	0 🚊 exact date 🔻	Date: 16/04/2017	
Re	Addresses, Phon	ne Numbers						
14532	Туре	Street One	Street Two	City	State	Postal Code Cour	nty	Country
jeji:	Home	8301 - 110 Street		Grande Prairie	AB	T8V 6T2		Canada
G								
<b>B</b> ≣								
1	Address Check							
	Term: 0	🚔 exact data 🔻 Data	: 16/04/2017			Add Edit	. Remove Mailin	ig Label
	Notices ad	dress: Home	•		Phone 1:	7805384656		
	Notification				Dhana 2	7900794656	Dell Canada	
	Nouncation o	Additional TVT poti			Phone 2.	700707000		
					Phone 3:			•
	eReceipt o	option: (None)	•	F	AX number:			
	Email ad	dress: JoeTraining@gmail.co	om	Alt Em	ail address:			
For Help,	press F1							NUM

From the "Patron Registration Workform" click on keyboard function key "F9" OR click on the Links menu option, then on "Patron Status" to link to the "Patron Status Work Form".



From the Polaris Toolbar, open the "Patron Status Work Form" from the Circulation drop down menu OR click on the Burgundy button, then the "Patron Status" icon.



Two views of the "Patron Status Workform" need to be examined and updated. They can be seen by choosing the "General" view and the "Notes" view from the "View" dropdown menu or by clicking on the first and last banner links.

Patron Status - 545513 - Items	Out - Polaris		
File Edit View Links Tools	Help		
General General Items Out	) 🗗 🗘 😭		
Account Claims Holds	Name: Patron code:	Joe Training Adult	
Reader Services Associations	Registered bran Phone 1: Where They Liv	: nch: Peace Library System (Branch) 7805384656 ve: Grande Prairie - City	
Refresh	Email address: F5 Notification opti	JoeTraining@gmail.com tion: Mailing Address	
tems out ☆		F 😂 🗗 👯 🛃 👿	🖪 🎪 🧼 🖂
Item Barcode	Title Author Due	Date Call Number Material Type Ren	e Assigned Br
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e			
			NUM

On the "General View" of the "Patron Status Workform" the "Blocks" in the lower right corner must be deleted. Click on the blocking text to highlight in blue, then click "Delete" underneath the "Block" box. The first message (Patron has notes) directs you to click on the bottom icon and move to the "Notes View".

File Ed	n Status - 545513 - Gen lit View Links Too	ieral - Polaris ols Help								- • ×	
2	┣ @ ┣	Í 脖 🗐	ø	Ţ	) [ 🤡						
S	Barcode: 2010000	0002489		Nar	ne:	Joe Training	9				
atu	Acct charges: Acct credit:	\$0.00 \$0.00		Patr Stat	on code: istical class:		Adult				
Ste	Items out:	0		Regi	istered branch:		Peace Library System (Branch)				
	Total overdue: Claims/Lost:	0 0/0		Phor Whe	ne 1: ere Thev Live:		78053 Grand	84656 e Prairie - Citv			
G	Items held:	Items held: 0					JoeTra	aining@gmail.con	n		
4	Total holds/ILL:	0/0		Noti	fication option:		Mailing	g Address			
鳥	Block			T C	Notice					1	
	Block				Title	Туре		Date	Method	Amount	
<u> 2</u>	'Patron has notes										
3	Registration has exp	eu ired									
A											
<b>12</b> 1											
2											
	Add	Modify	Delete								
For Help	press F1								0 of 0	record(s) retrieved	

On the "Notes View" of the "Patron Status Workform" various notes may be present. Below, a "Blocking" note is preventing card use, and has caused the "Notes" icon to appear red colored (It is yellow if the "Non-blocking" note field has an entry). Clear up any "Blocking" notes with the patron so they may resume use of their card.

Patron S	Status - 545513 - Note	s - Polaris			- • ×
File Edit	View Links Tool	s Help			
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S	Barcode: 20100000	02489	Name:	Joe Training	
atu	Acct charges: Acct credit:	\$0.00 \$0.00	Patron code: Statistical class:	Adult	
Sta	Items out: Total overdue:	0	Registered branch: Phone 1:	Peace Library System (Branch) 7805384656	
	Claims/Lost:	0/0	Where They Live:	Grande Prairie - City	
	Total holds/ILL:	0/0	Email address: Notification option:	Joe I raining@gmail.com Mailing Address	
	Notes				
	Non-blocking:			Blocking: This block is here until Joe picks up his driver!	s license from the library
928				manager.	s license from the library
Â					
2			-		*
	Message Text			Patron Has Read	
					Add Message
					Modify Message
					Delete Message
For Help, pr	ress F1				Record Saved

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to <mark>Save</mark>		≩日 8	) 🗙 🕄 🚺	/ 😭 🗘	E?				
your work!	S	Barcode:	2010000002489		Regist	ered at: Pe	ace Library System	(Branch) (APRPLS)	-
	iti	Last name:	Training		Patro	on code: Ad	ult		<b></b>
	t l	First name:	Joe			-			
	iS	Middle name:	- <b>(</b>			Term:	n: 0 ≑ exact da	te • Date: 16/04/2	2017 🗐 🔻
	leg	lite:	✓ Sumx:						
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Ouestions?	鈲	Home	8301 - 110 Street	Street Iwo	Grande Prairie	AB	T8V 6T2	County	Country Canada
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talk to a		Term: 0	exact dat 🔻 Dat	e: 16/04/2017			Add	Edit Remove	Mailing Label
member of the		Notices addr	ress: Home	•		Phone 1:	7805384656		TXT
		Notification op	otion: Email Address			Phone 2:	7809784656	Bell Canada	
consulting			Additional TXT noti	ce		Phone 3:			
team!		eReceipt op	otion: (None)	•		FAX number:			
780-538-4656		Canal - J.J.	lasTesisian @1 -						
		Email addr	ress: Joe I raining @gmail.co	m	Alt	Email address:			
1-000-422-00/5	For Help,	press F1							NUM